Chapter X: Enter and Maintain Documents

Table of Contents

Document Entry Worksheet

You enter documents using the **Document Entry Worksheet**. The types of documents you can enter are:
- Free-text entry document that you create by entering text in a text box.
- Flowsheet that you use to record patient observations in a grid format.

The **Document Entry Worksheet** contains a two-pane **Document Browse**, where you locate the type of document you want to enter, and a **Document Summary** window, where you can review documents before you submit them. The worksheet, and each window within it, is resizable using the standard Windows resizing functions.

When you select a document to enter, a **Free Text Entry** dialog box**,** or the **Flowsheet Manager** opens. Your security rights for entering documents determine the types of documents that display in the browse.
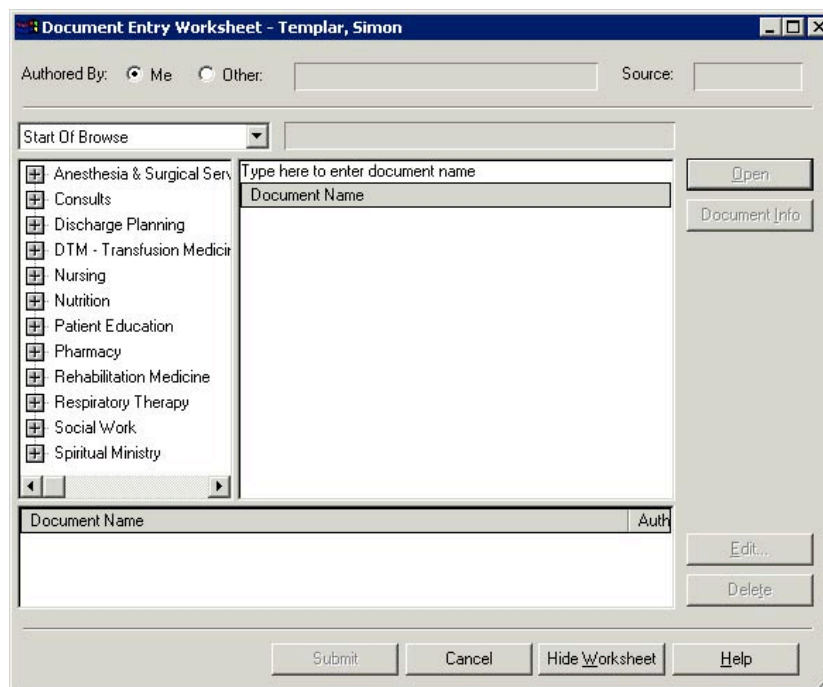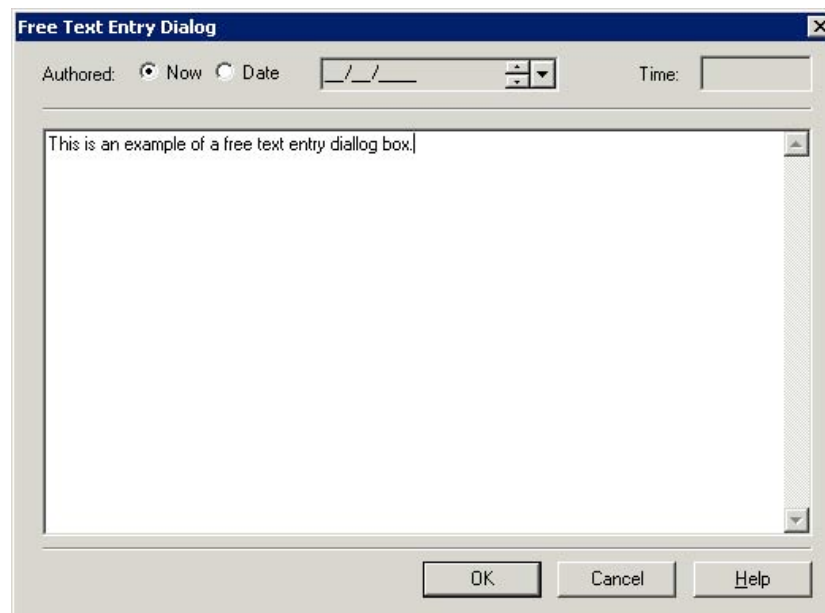

Screen 1: Document Entry Worksheet

Select documents

1. Open the **Document Entry Worksheet** using one of the following methods:
   a. On the toolbar, click the **Enter Document** icon.
   b. From the **GoTo** menu, select **Document Entry Worksheet**.
2. Locate a document in one of the following ways:

> a. Select **Start of Browse** and navigate through the tree to locate the document category you want. When you select a category in the left pane, the right pane lists all the documents in the category.
> b. Select **Manual Entry** and enter part of the document name in the **Type here to enter document name** field and pause. CRIS displays all the documents that start with the characters you typed.

3. In the right pane of the **Document Browse**, double-click the document name, or select the document and click **Open**. If the document is defined as a free-text document, the **Free Text Entry** dialog box opens. If the document is defined as a flowsheet, the **Flowsheet Manager** opens.

Enter Free Text Notes

Free-text documents are those composed of text in a free-form format. In a text window, you type the information you want to convey, creating paragraphs where appropriate. You can enter textual and numeric information, such as a brief progress note.
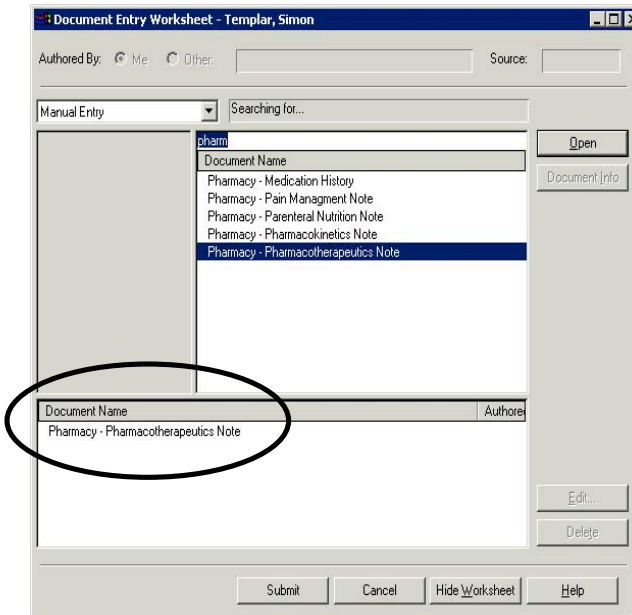

Screen 2: Free Text Entry Dialog box

To enter a free text note:
4. Type your comments in the text window.
5. Click **OK** to return to the **Document Entry Worksheet**. The new document is listed in the **Document Summary** window.
6. When you are done, click **Submit** to submit all the documents in the **Document Summary** window. The document is submitted.

Edit un-submitted documents

You can edit a document before or after you submit it. Free text documents that have not yet been submitted are listed in the **Document Summary** window of the **Document Entry Worksheet**.

Screen 3: Document Summary window

To edit an un-submitted free text document
1. In the **Document Summary** window, select the document you want to edit.
2. Click **Edit**. The **Free Text Entry** dialog box for the selected document opens.
3. Change or add to the existing text and click **OK**. You return to the **Document Entry Worksheet**.
4. Click **Submit** to record the document in the patient's chart.

Delete an un-submitted document

You can delete a document before you submit it. After you submit a document, you can edit or cancel the document, but not delete it. Documents that have not yet been submitted are listed in the **Document Summary** window of the **Document Entry Worksheet**.

To delete an un-submitted document
1. In the **Document Summary** window of the **Document Entry Worksheet**, select the document you want to delete.
2. Click **Delete**. The document is removed from the **Document Summary** window.

Enter Flowsheets

You can use flowsheets to record observations in CRIS. Flowsheets are collections of clinical observations that are repeated on a regular basis, and displayed in a grid format. They represent the most common type of documents used by nurses and other ancillary care providers to record patient care. The ability to add data to a particular flowsheet is determined by the security rights for the document.

The **Flowsheet Manager** is a resizable dialog box; you can also change the size of the panes within the dialog box using the standard Windows resizing functions. The shape and size is saved when you close the **Flowsheet Manager**. Observation names are listed down the left side, and observation values are displayed in the scrolling date/time columns.
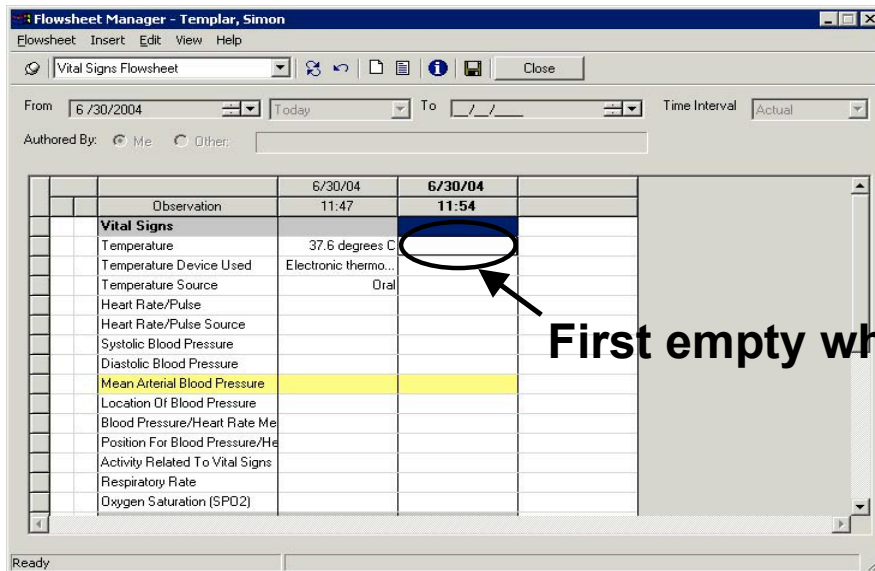
Each column of observations on the **Flowsheet Manager** represents a separate "instance" of a flowsheet document. You can create new columns of entries by highlighting the empty column at the far right side of the grid.

You can perform the following functions in the **Flowsheet Manager**:
1. Add a new column of observation entries.
2. Add, edit and view comments for an observation.
3. Edit or cancel existing observation entries.
4. Access facility-defined observation information (drop-down lists).

To open the Flowsheet Manager from the Document Entry Worksheet:
1. Select a flowsheet from the **Document Browse**.
2. In the **Document Entry Worksheet**, click **Open**. The **Flowsheet Manager** displays.

Screen 4: Flowsheet Manager

Add a new column of observations

Each column of observations on the **Flowsheet Manager** represents a separate "instance" of the flowsheet document. You can create a new column by highlighting the empty column at the far right side of the grid.

When you first click in any cell of an empty column, the current date and time are displayed. You can set the time for task completion using a shortcut menu - you can either select an actual time, listed in 15-minute increments from the current time, or set an exact day and time in the **Set Column Date/Time** dialog box.
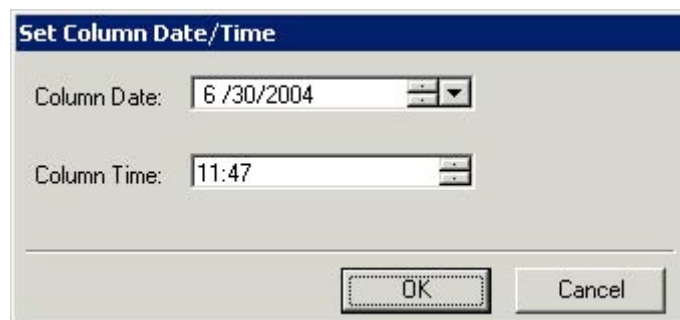
Screen 5: Set Column Date/Time Dialog box

Change the date or time of the Flowsheet Column

3. Right-click on the time column header.
4. From the shortcut menu, select **Set Date/Time**. The **Set Column Date/Time** dialog box opens.
5. Enter the desired date and/or time for the column.
6. Click **OK**. The date and time you entered are displayed at the top of the column.

Documenting in a flowsheet

In a flowsheet, there are multiple ways to enter information. Begin by selecting the cell where you want to document. Leave blank any cells that don't apply. Examples of the different types of entry methods are:

- Type-in fields are empty text boxes that allow you to enter up to 250 text or numeric characters.
- Numeric-only fields are empty cells where you can **ONLY** type numeric characters (e.g. 100). The unit of measure is added by the system where applicable (e.g. mL).
- Restricted Single-Select Lists require you to select only one option from the list displayed.
- Suggested Single-Select Lists allow you to either select an option from the list and/or type in additional data. **NOTE**: You may need to expand your column to enter the additional information.
- Restricted Multi-Select Lists have check boxes that allow you to select one or more options from the list displayed.
- Suggested Multi-Select Lists have check boxes that allow you to select one or more options from the list displayed and/or type in additional data. **NOTE**: If you must add additional data, type your data first, then click the applicable checkboxes.

7. To move from cell to cell within the flowsheet,
   a. Either click on the next cell where you want to enter documentation or
   b. Press the up and down arrows to move to another cell. **NOTE**: The right and left arrow keys move from column to column.
8. After you have entered all the information into the flowsheet. Click the Save icon.
9. Click Close to close the Flowsheet Manager.

Add a comment to a flowsheet

Some flowsheets may not contain all the observations you need for your patient. In this case, there are generically named observations available in specific flowsheets for documenting information on items not listed. For example: in the Intake and Output flowsheet there are observations named Drainage #1, Drainage #2. Comments are used to specify what type of drainage you are documenting.

1. After data has been entered into a flowsheet cell, right click on that cell and select **Add Comment**.
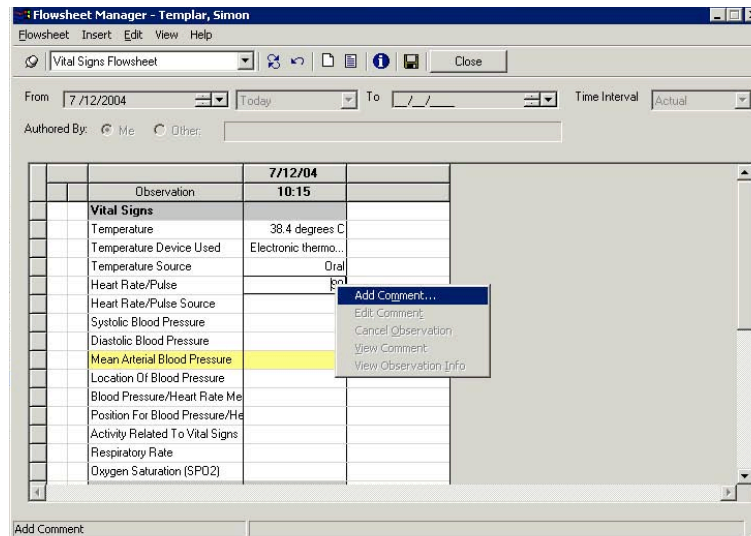
Screen 6: Add comment to a cell

2. The **Add New Comment** window displays. Enter description for observation.
3. Click **OK** to close the comment window.
4. To save your flowsheet, click the **Save** icon. **Note**: Once you save the flowsheet an "*" will display in that cell indicating there is a comment.
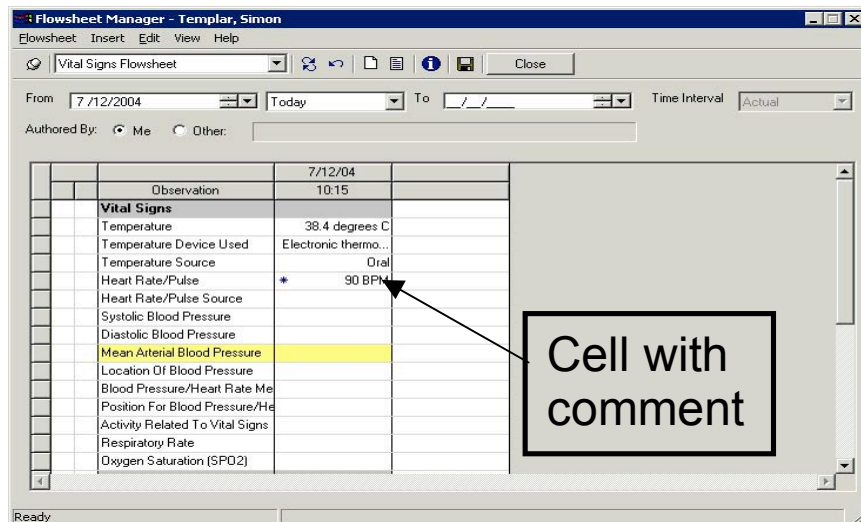
Screen 7: Cell with comment
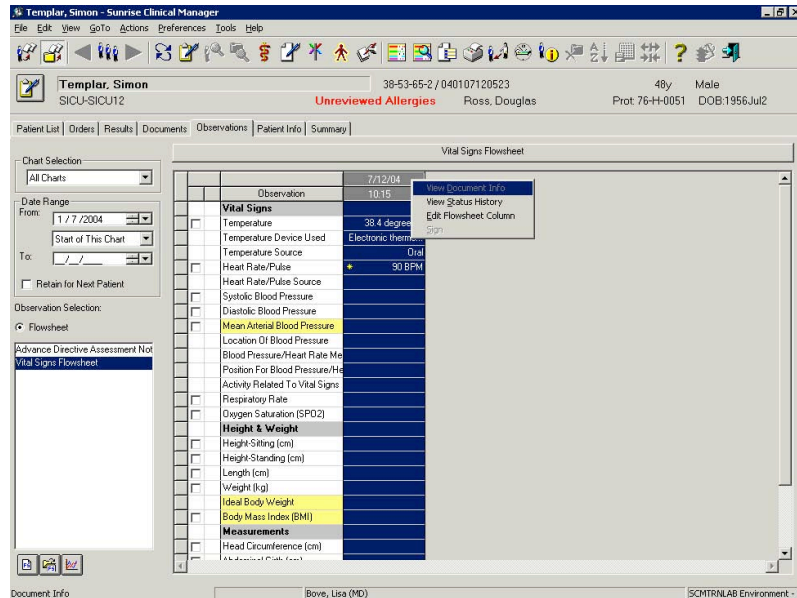
Edit observation values

You can change the value of an observation after you have saved it. Observations that have been edited are indicated with a paper icon in the **Flowsheet Manager**.

Screen 8: Flowsheet Cell Edit Icon

To edit an observation value:
1. You can switch to Edit mode in two ways
    a. From the Observations tab, right-click on the desired column. Select **Edit Column** from shortcut menu.

Screen 9: Edit flowsheet from Observation tab

    b. From the Documents tab, right-click on the desired flowsheet entry.
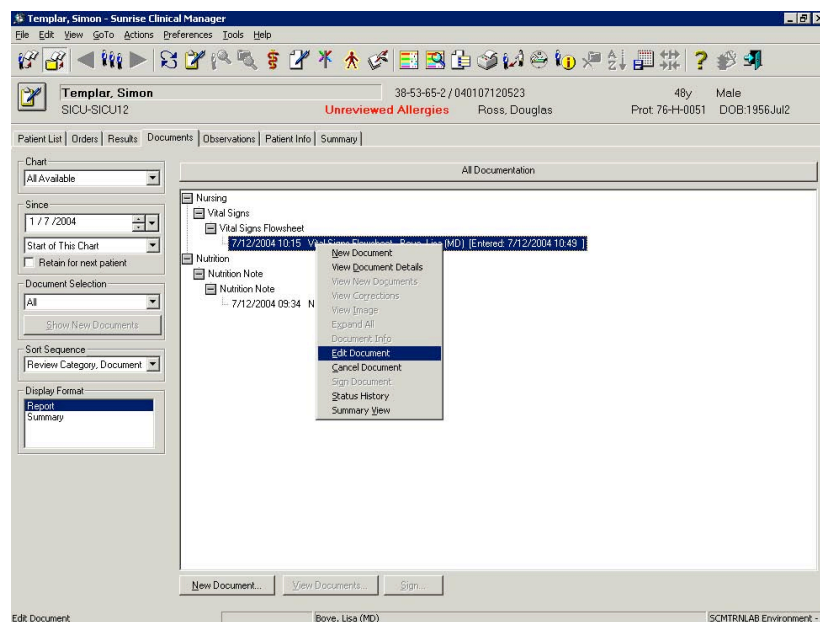
Screen 10: Edit flowsheet from Documents tab

2. Select the observation you want to edit and enter the desired value.
3. **Save** the flowsheet.

Cancel Observations

You can use the Cancel Observation dialog box to cancel an observation in the Flowsheet Manager. You must be in Edit mode to cancel an observation. The reason you enter is displayed in the Observation Status History dialog box. After you cancel an observation, it is displayed in strike-out text in the Flowsheet Manager.

To cancel an observation:
1. To switch to Edit mode, right-click on the desired column and select **Edit Column** from the shortcut menu.
2. Right-click on the observation cell you want to cancel and select **Cancel Observation** from the shortcut menu. The **Cancel Observation** dialog box opens.
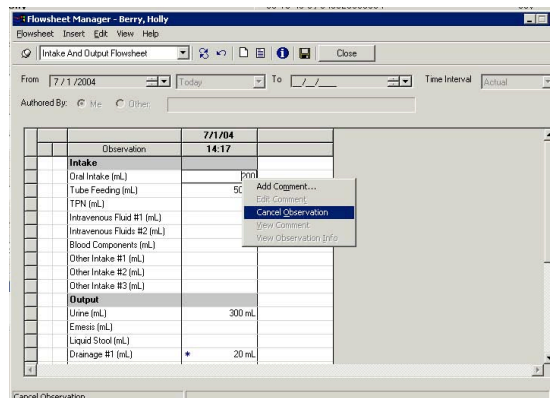
Screen 11: Cancel Observation

3. In the **Reason** drop-down list, select the reason you want to cancel the observation.
4. Click **OK**. The observation is displayed in strike-out text to indicate it has been canceled.
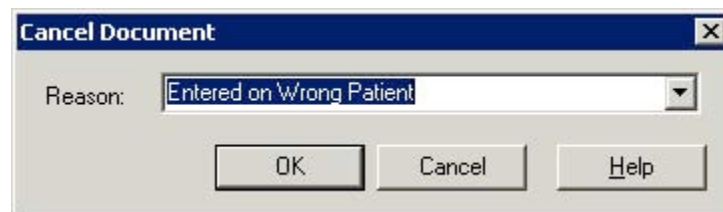
Screen 12: Cancel Document Dialog box

To cancel a document:
1. From the Documents tab, right-click on the document you want to cancel.
2. From the shortcut menu, select **Cancel Document**. The **Cancel Document** dialog box opens.
3. In the **Reason** drop-down list, select the reason you want to cancel the document.
4. Click **OK**.

Edit Submitted Documents

You can edit a document either before or after you submit it.   If you have the appropriate security rights, you can edit a submitted document. A document that has been edited is indicated by a **Corrected Document** icon to its left.

Screen 13: Edit Document Icon

When a document has been edited, CRIS considers it a new document again; the **New Docs** flag appears in the **Patient List**.

To edit a submitted document:
1. In the **Report** view, select the document you want to change.
2. Right-click on the document and from the shortcut menu, select **Edit Document**. The associated **Free Text Entry** or **Flowsheet** dialog box opens.
3. Make your changes to the document.
4. Click **OK**. A **Corrected Document** icon appears next to the document.

Documents Available in CRIS by Department are provided on the next three pages.

Anesthesia & Surgical Services
DASS Pre-Operative Nursing Assessment
DASS Receiving Area Assessment
DASS Pre-Surgical Care Note
DASS Post-Surgical Care-Minor Surgery
DASS Post-Surgical Care-Neurosurgery
DASS Post-Surgical Care-Oncology/Eye
DASS Post-Surgical Care-Vascular Line
DASS Post-Op Nursing Evaluation Note

Consults
Dental Service Consult

Discharge Planning (all disciplines)
Art Therapy Discharge Note
Discharge Instructions Note - Nursing
Discharge Note - Nursing
Massage Therapy Discharge Note
Music Therapy Discharge Note
Recreation Therapy Discharge Note
Social Work Resource/Discharge Plan
Speech Language Path Discharge Report
Spiritual Ministry Discharge Note

DTM - Transfusion Medicine
Apheresis (Automated) Note
Manual Apheresis/Phlebotomy Note
Apheresis Exchange Therapy Note
Transfusion Reaction Investigation Note
Blood Component Admin - Apheresis
Blood Component Administration - Nursing
Blood Component Administration – Surgery

Nutrition
Nutrition Screening Note
Nutrition Assessment and Plan
Nutrition Research Note
Nutrient Intake Flowsheet
Body Composition Flowsheet
Nutrition Note
Nutrition Co-Sign Note

Patient Education
Patient Education Flowsheet

Pharmacy
Pharmacy - Medication History
Pharmacy - Pharmacotherapeutics Note
Pharmacy - Pharmacokinetics Note
Pharmacy - Pain Managment Note
Pharmacy - Parenteral Nutrition Note

Rehabilitation Medicine
General
Rehabilitation Medicine Encounter Note
Art Therapy
Art Therapy Service Note
Art Therapy Treatment Note
Art Therapy Short-Term Treatment Note
Art Therapy Discharge Note
Massage Therapy
Massage Therapy Service Note
Massage Therapy Treatment Note
Massage Therapy Short-Term Tx Note
Massage Therapy Discharge Note
Medical Section
Rehabilitation Medicine Consultation
Music Therapy
Music Therapy Service Note
Music Therapy Treatment Note
Music Therapy Short-Term Treatment
Note
Music Therapy Discharge Note
Physical Disabilities Branch
Human Movement Disorders (HMD) Note
Oral Motor Function (OMF) Note
Physical Therapy
Physical Therapy Note
Occupational Therapy
Occupational Therapy Note
Recreation Therapy
Recreation Therapy Assessment
Recreation Therapy Service Note
Recreation Therapy Treatment Plan
Recreation Therapy Treatment Note
Rec Therapy Short-Term Treatment Note
Recreation Therapy Discharge Note
Recreation Therapy Note
Speech Language Pathology
Speech Language Pathology Note
Speech Language Pathology Interim Note
Speech Language Path Discharge Report

Respiratory Therapy

Assessment (RT)
Aerosol Therapy Flowsheet
Bronchial Hygiene Therapy Flowsheet
Gas Therapy Flowsheet
Non-Invasive Ventilation Flowsheet
Invasive Ventilation Flowsheet
Hemodynamic Monitoring Flowsheet
Procedure Note (RT)
ABG Note
EEG Note
Respiratory Therapy Note

Social Work

Social Work Screening Note
Social Work Preadmission Assessment Note
Social Work Psychosocial Assessment
Social Work Reassessment Note
Social Work Treatment Plan & Outcomes
Social Work Interdisciplinary Consult
Social Work Progress Note

Spiritual Ministry

Spiritual Ministry Assessment

Nursing

Admissions
    Advance Directive Assessment Note
    Admission Assessment Note
Respiratory
    Respiratory Observation Flowsheet
Circulation
    VAD-Central Assessment Note
    VAD-Peripheral Assessment Note
    VAD Observation Flowsheet
    Circulation Observation Flowsheet
    Holter Monitoring Note
Food & Fluid
    Food & Fluid Needs Assessment Note
    Food & Fluid Needs Observation Flowsheet
Elimination
    Elimination Observation Flowsheet
Neurosensory
    Neurological (Specialty) Assessment
    Neurosensory Assessment Note
    Neuro Vital Signs Flowsheet
    Seizure Assessment Note
Sleep & Rest
    Sleep Assessment Note
    Sleep Observation Flowsheet
Physical Safety
    Missing Person Note
    Restraint/Seclusion Log-Behavioral Hlth
    Restraint Log-Medical/Surgical & ICU
    Physical Injury Assessment Note
    Physical Safety Room Search Note
    Pre Restraint/Seclusion Assessment Note
    Physical Safety Observation Flowsheet
    Post Seclusion And Restraint Note
Mobility
    Mobility Observation Flowsheet
    Mobility Assessment Note
Comfort & Pain
    Pain Assessment Note
    Patient Controlled Analgesia Flowsheet
    Pain Observation Flowsheet
Skin & Hygiene
    Skin & Hygiene Observation Flowsheet
    Extravasation Note

Sexuality
    Sexuality (Female) Assessment Note
    Sexuality (Male) Assessment Note
Psychosocial
    Psychosocial - Mental Status Assessment
    Psychosocial-Substance Abuse Assessment
    Psychosocial Observation Flowsheet
    Psychosocial - History Note
    Psychosocial - Growth & Development Note
    Suicide Risk Assessment Note
Vital Signs
    Vital Signs Flowsheet
    Intake And Output Flowsheet
    Arm Span Measurement Note
    3/10 Height Measurement Note
Blood Component Administration
    Blood Component Administration - Nursing
Chemo & Biotherapy
    Chemo/Biotherapy Administration Note
    Cell Product Administration Note
Conferences
    Telephone Contact Note
    Care Conference Note
Point Of Care Testing
    Bedside Glucose Monitoring
    Point Of Care Testing Results Flowsheet
    Skin Test Result Note
    Urine Specific Gravity Results Flowsheet
Procedures & Tests
    Apheresis Note - 2J
    Hemodialysis Procedure Note
    Insulin Pump Flowsheet
    Insulin Pump Note
    Post Procedure Observation Flowsheet
    Pre Procedure Checklist
    Endoscopy Visit Note
    Endoscopy Gastric Analysis Note
    Endoscopy Procedure Note
    Liver Biopsy Procedure Note
    Bronchoscopy Procedure Note
Transfer, Pass & Expiration
    OR Transfer Note
    Expiration Note
    Pass Note